SELF-EVALUATION FORM FOR FY2003 CARL D. PERKINS SPENDING PLAN

LEA/COLLEGE/AGENCY: _____

In the first column, enter "Y" for Yes, "N" for No, and "NA" if Not Applicable.

Y/N/NA	#	CRITERIA
		SPENDING PLAN TITLE PAGE & BOARD RESOLUTION
	1.	Is the **Spending Plan Title Page** included and are **all items correct and complete**?
	2.	If the **Board Approval Date** is <u>before</u> the Application Submission Date, is the approval date entered in item 7 of the **Title Page**?
	3.	If the **Board Approval Date** is <u>after</u> the date the application is submitted, is the LEA/College/agency preparing to submit a copy of the **Board Resolution**, <u>or</u> a certified copy of minutes showing board approval, to OSCCI as soon as the board approves the submission**? (NOTE: The NJDOE will not approve the spending plan unless the board has approved submission of the plan, as evidenced by the Title Page or a copy of the Board Resolution.)**
	4.	Does the **Total Funds Requested amount** match the **Allocation amount** on the allocation notification letter? **Allocation amount: $_____** **Total Funds Requested (Item 8b): $_____**
	5.	If <u>not</u> a consortium does the amount in **Item 8 match** the amount in Item **8b**?
		FOR CONSORTIUM ONLY
	6.	Has the **lead agency** included its signed and dated **Title Page** form?
	7.	Has the **lead agency** included a <u>signed and dated</u> copy of the **Title Page** from **each** of the consortium participants?
	8.	Has the board of each consortium participant approved the participant's membership in the consortium **ON OR PRIOR TO THE DATE THE LEAD AGENCY SUBMITTED THE SPENDING PLAN TO OSCCI,** as shown in item 7 of the particpant's Title Pages?
	9.	If answer to number 8 (above), is "NO", is the lead agency preparing to submit a copy of the **Board Resolution to Apply as a Member of a Consortium**, <u>or</u> a certified copy of minutes showing board approval, as soon as the district board approves the participation in the consortium? **(NOTE: The NJDOE will <u>not</u> approve the spending plan unless all boards have approved participation in the plan, as evidenced by the Title Pages or a copy of the Board Resolution to Apply as a Member of a Consortium, for each consortium participant.)**
	10.	For every consortium participant, does the amount in item 8 equal the amount in item 8a? Does the amount in item 8b equal $0?
	11.	Do items 8 and 8b on the Consortium Applicant's (Lead Agency) Title Page equal the **total** contribution of **all members** of the consortium?
	12.	Did **each** consortium participant name the consortium applicant/lead agency in item #9 on the **Title Page**?
	13.	Has the Chief School Administrator/College President/Agency Head completed Items 11 and 12 on the **Title Page** form?
		FISCAL FORMS
		A. Budget Detail Form A
	14.	Are items **A-E** completed accurately?
	15.	Is there a <u>separate</u> **Budget Detail form** (or set of forms**)** for **each Function and Object Code** used**?**
	16.	Are appropriate **Goals and Objective Numbers (**from the latest approved **Multiyear Plan)** included for **each** expenditure item?
	17.	Are codes for the appropriate **Standards and Measures** (from the latest approved **Multiyear Plan)** included for **each** expenditure item?
	18.	Are **CIP Code**(s) provided for **all** requested expenditure items?
	19.	Are the **descriptions/itemizations/justifications** adequate to provide all the information necessary for approval?

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Y/N/NA	#	CRITERIA
	20.	**Is the math correct?** Does column J times column K equal column L?
	21.	Does the total for each **Expenditure Category and Function and Object Code** match the total for that category on the **Grant Budget Summary form?**
	22.	Are **Consumable Supplies** (100-600, 200-600), requiring further detail, itemized and consistent with policies in Section 6.3.1.7 of the **Spending Plan Guidelines**?
	23.	Does each **Non-Consumable Supply item** (100-600, 200-600) exceeding $250 include the minimum specifications as required by Section 6.3.1.8 of the **Spending Plan Guidelines**?
	24.	Does proposed **Equipment** (400-731, 400-732) meet the definition of equipment and is adequate back-up detail provided as required by Section 6.3.1.9 of the **Spending Plan Guidelines**?
	25.	Are costs for **Keynote Speakers and Session Presenters' Services** equal to or less than $1,500 per day per presenter? (GAAP 100-300, 100-500, 200-300, 200-320, and 200-500)?
	26.	For all requested **Staff Travel Costs** (200-580), are adequate detail and justification provided, as required by Section 6.3.1.6.1 of the **Spending Plan Guidelines**?
	27.	Are **Staff Registration Fees** listed in 200-500?
	28.	Are requests for **Student Workshops and Travel** (100-800, 200-500, 200-600) supported by adequate detail?
	29.	Are the **page numbers** (item M) **and totals** (item N) **correct?**
	30.	**Is each budget detail page signed and dated by the Business Administrator/Chief Financial Officer?**
		B. Budget Detail Form B - Employee Benefits
	31.	Are **items A-C** completed accurately?
	32.	Has the **position title** and **name of employee** been included?
	33.	Are all **Fringe Benefits (200-200)** listed on **Budget Detail Form B**?
	34.	Are **CIP Code(s) provided** for all requested expenditure items?
	35.	Are appropriate **Goals and Objective Numbers** (from the latest **approved Multiyear Plan**) included for each expenditure item?
	36.	Are codes for the appropriate **Standards and Measures** (from the latest **approved Multiyear Plan**) included for **each** expenditure item?
	37.	Is the **salary amount requested** in the grant listed accurately?
	38.	Are **TPAF and FICA** contributions (for employees in TPAF) budgeted for 15% for employees, if paid with federal program funds? (TPAF = 7.35% and FICA = 7.65%)
	39.	Is **FICA** contribution for part-time, non-TPAF grant-funded employees 7.65%?
	40.	Is **FICA** for **Federally Funded Stipends** budgeted for 7.65%?
	41.	**Is the math correct**? Do all of the benefits requested equal the amount(s) listed in column L?
	42.	Are the **page numbers** (item M) and **totals** (item N) **correct?**

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Y/N/NA	#	CRITERIA
	43.	**Is each budget detail page signed and dated by the Business Administrator/Chief Financial Officer?**
		C. Budget Detail Form C - Salaries
	44.	Are **items A-F** completed accurately?
	45.	Are **Salary Costs** for category 100-100 listed on the **Teacher Salaries form**?
	46.	Are **Noninstructional Salary Costs** for category 200-100 listed on the **Noninstructional Salaries form**?
	47.	Are **CIP Code(s) provided** for all requested salary items?
	48.	Are appropriate **Goal and Objective Numbers** (from the latest **approved Multiyear Plan**) included for **each** requested salary?
	49.	Are codes for the appropriate **Standards and Measures** (from the latest **approved Multiyear Plan**) included for **each** requested salary item?
	50.	Are the **position title** and **name** (if known) of each **grant-funded employee** entered?
	51.	Is the name of any **requested salary position,** requested dollar amount, and specific job responsibilities included in the **description/itemization**?
	52.	Are the **cost calculations** shown **clearly**?
	53.	**Is the math correct?** Does the information in column L agree with the information shown in column K?
	54.	Are the **salary totals** (item M) **correct?**
	55.	Is each **budget detail page signed and dated** by the Business Administrator/chief financial officer**?**
	56.	**Is the Salary Narrative Questionnaire and Justification form completed accurately?**
	57.	**Is the information** on the **Salary Narrative Questionnaire and Justification form adequate** to explain and justify the position funding requested?
		D. Grant Budget Summary Form
	58.	**Are items A-C completed accurately?**
	59.	Are **Program and Administrative Costs** entered by appropriate **Expenditure Category** and **Function and Object Code?**
	60.	Do **Administrative Costs** equal no more than 5% of the total **program costs** and are they listed in the appropriate columns?
	61.	Do line item **amounts** on the **Grant Budget Summary** form equal the total amounts for each **expenditure category** and **function and object code** as shown on the Budget Detail Form(s)?
	62.	Is the **Grant Budget Summary Form** complete and accurate and does it match the amount listed in item 8 on the **Title Page**?
	63.	Has the **BA/CFO** signed and dated the form?

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		E. BUDGET AND EXPENDITURES BY QUARTER
	64.	Has the form been **completed correctly**, listing the projected expenditures by quarter?
	65.	Has the **BA/CFO signed** the form on line G1?
		STATEMENT OF ASSURANCES
	66.	Is the **Statement of Assurances** included and **signed and dated** by the Chief School Administrator/College President/agency head or designated signatory?
		MULTIYEAR PLAN (IF SUBMITTED)
	67.	If submitting a **new** **Multiyear Plan**, has the new **Multiyear Plan** been **included** with the **Spending Plan** for submission to NJDOE?
	68.	If **revising** the **approved Multiyear Plan**, have the **Multiyear Plan revisions** been submitted with the **One-Year Spending Plan?**
		WORKFORCE INVESTMENT BOARD REVIEW
	69.	Has the **FY2003 Spending Plan** been submitted to the **WIB(s)** for review?
	70.	If applicable, has the new, or revised, **Multiyear Plan** been submitted to the WIB(s) for review and comment?
		OTHER
	71.	**Has the FY 2001 Final Report been submitted to NJDOE?**
	72.	**Has the FY 2002 Interim Report been submitted to NJDOE?**